LANDSCAPE
WEALTH

Landscape Wealth Advisors

"TRAVELER THERE IS NO PATH, THE PATH IS MADE BY WALKING"

– Antonio Machado

WELCOME TO YOUR JOURNEY. WELCOME TO TRUE WEALTH.

True wealth is about more than a balance sheet. It's about achieving the life and legacy you desire. We combine a rigorous investment methodology with insightful financial planning to address the totality of our clients' lives. We believe this is critical to successfully navigating life's transitions and the complexities of today's investment landscape.

Our mission is to create and preserve wealth while delivering a premier investment management experience. We leverage the insights of our investment professionals and partnerships to generate extraordinary investment management services while maintaining our good name and the good name of our clients.

THREE SERVICE MODELS

WEALTH CREATION EVERY STEP OF THE WAY

We employ a broad range of highly personalized services for individuals, families, trustees, corporations and philanthropic institutions across the country:

WEALTH MANAGEMENT

+ Integrated investment & financial planning
+ Tax maximized "wealth creation" portfolios
+ Annual goals-based planning process

+ Personal trust management
+ Executive Compensation & 10b5-1 planning
+ Liquidity event & cash-flow planning
+ Gifting and tax strategies
+ Donor Advised Funds (DAFs)
+ Values-based investing
+ Educational planning
+ Supporting loved ones

EMERGING WEALTH

+ Retirement savings planning
+ Cost-efficient investment management
+ Globally diversified portfolios
+ 401(k) implementation and rollovers
+ Ad hoc retirement and financial planning
+ Wealth advice roadmap

INTERGENERATIONAL WEALTH & FOUNDATIONS

+ Strategic philanthropy & grantmaking
+ Intergenerational trust management
+ Generation-skipping tax planning
+ Legacy gift planning
+ Supporting future generations

OUR APPROACH MAKES US DIFFERENT

FINANCIAL PLANNING PROCESS

Our approach is based on comprehensive wealth management, and informed by a holistic perspective. Our process, at its core, is grounded in the belief that we must first build a mutual understanding of a client's life before we can earn the right to offer advice. Successful investing requires a deep connection to client's goals and is the best way to add clarity to their financial future.

INVESTMENT PROCESS

We take a disciplined 'wealth creation approach' to investing. Whenever possible we:

+ Invest directly in high-quality companies and buy to own.
+ Build and maintain customized portfolios across multiple asset classes and reinvest with discipline.
+ Invest for the long term.
+ Take only the risks we need to take.

Direct ownership of a diversified portfolio of quality companies is the most tax efficient, transparent, and flexible way to build wealth over the long term.

PHILOSOPHY

As a leading Bay Area independent financial advisor, we understand that trust is the foundation for all successful partnerships. Earning our clients trust means we:

+ Communicate with openness, clarity, and honesty.
+ Provide a transparent and fair cost structure.
+ Put the needs of our clients ahead of our own.
+ Minimize conflicts of interest.
+ Utilize an open-architecture fee-based investment platform whenever possible.
+ Maintain an open dialogue with our clients and learn from every relationship.

Lee Crocker, CFP®

FOUNDING PARTNER OF LANDSCAPE WEALTH ADVISORS

Lee brings a passionate commitment and unique perspective to his practice of advising clients. He has more than 15 years of experience in professional financial advisory services. He specializes in wealth management at every stage of life, from growing wealth to managing and protecting assets, through intergenerational wealth planning.

READ LEE'S BIO

LOGIN TO FETCH